

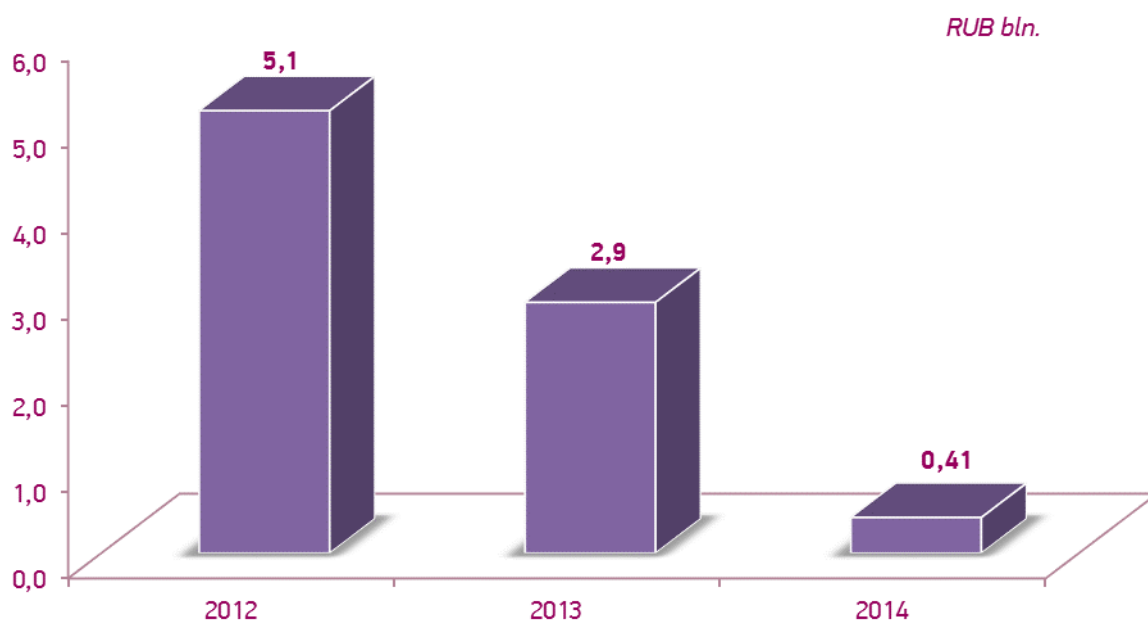
Russian Market of Bedside Patient Monitors

2012-2014

Summary

The global market of bedside monitors is characterized by steady growth. The compound annual growth rate (CAGR) of the global market of bedside monitors for the 2006-2013 period was 3.1%. The segment continues to grow, although not as quickly as the market of medical devices generally with its CAGR 5.0%. The global market of bedside monitors is expected to keep expanding by approximately 3.9% a year and reach USD 4.1 bln. by 2020.

The Russian market of bedside monitors takes 3% of the global market of bedside monitors. In 2011-2013 regional modernization programs for Russia's public health care system sharply accelerated consumption of bedside monitors in the country, to RUB 5.1 bln. in 2012. The programs' expiration lead to a collapse of the Russian market in the middle of 2013, 43% down from the previous benchmark. It continued to decline in the 1st half of 2014. In fact, the level of consumption that would normally have been reached in 2012-2015 was achieved in 2011-2012, the year most bedside monitors were obtained on program money.



The dynamics of the Russian market of bedside monitors (billion rubles), 2012-1st half of 2014

Public procurement dominates the Russian market of bedside monitors. The private sector's contribution to market value is small. In 2012 it was only 5%. In 2013, with demand from public buyers contracted, private customers made few advances, their share was 7%. In the first half of 2014 it dwindled to 1%.

Report Description

Report scope. The report provides full information about the Russian market of bedside monitors in 2012 – the 1st half of 2014 and general background information on the global market of bedside monitors. It also contains a forecast of the Russian market of bedside monitors till 2018.

The total number of pages – 81.

Report includes the following parts:

“Study methodology” section includes a list of information sources, which were used while preparing the report. It also explains what kinds of bedside monitors were the subject of the research.

“Introduction” section clarifies the structure of the report. Attention is drawn to the absence of one commonly accepted classification of bedside monitors. MDpro’s own classifications are given.

The first part of the report (*“Russian medical device market in 2013-2018”*) encompasses the most important characteristics of the Russian medical device market. It contains information about its dynamics and structure, public procurement and import-export operations. The most important Russian medical device market trends and significant factors, determining its current state, are outlined. This part also includes a forecast of the Russian medical device market development until 2018. Based on the analysis of drivers and barriers for the market growth, two possible scenarios of market development are presented.

The second part (*“The global and Russian markets of bedside monitors in 2012-1st half of 2014”*) provides information about the dynamics and structure of the global market of bedside monitors. It also includes data on the main market players both worldwide and in Russia. Finally, key characteristics of the Russian market of bedside monitors are outlined.

The third part (*“Sales of bedside monitors of specific manufacturers”*) includes a classification of all bedside monitors purchased by Russian public buyers by four parameters: mobility, patient age, type and grade (number of channels). Additionally, this section contains information about best-selling models of bedside monitors and sales figures of leading manufacturers on the Russian market.

The fourth part (*“Imports and exports of bedside monitors on the Russian market”*) encompasses data on import-export operations of bedside monitors. Import information includes annual and quarterly dynamics of imports, the structure of imports by countries of origin and manufacturers. Besides, Top-20 recipients of imported bedside monitors at customs are named. Finally, it includes a list of the largest recipients of bedside monitors by leading manufacturers at customs. Export information contains annual dynamics of bedside monitors exports and a list of the largest Russian exporters.

The fifth part (*“Public procurement of bedside monitors”*) is dedicated to the results of bedside monitors public procurement analysis. It includes data on the dynamics and structure of public procurement of different types of bedside monitors. The largest purchasers of bedside monitors in monetary and physical terms are presented. A list of public buyers of the highest-priced bedside monitors is provided. It also contains a list of the biggest suppliers of bedside monitors under government contracts in monetary and physical terms. Moreover, this section provides information about Russian regions, which are the leaders in bedside monitors public procurement purchasing.

The sixth part (*“Pricing of bedside monitors”*) is a price review of bedside monitors purchased under government contracts. Average prices of different kinds of bedside monitors (incl. federal district breakdown) are shown. Besides, minimum, maximum and weighted average prices of Top-15 bedside monitors purchased under government contracts are provided.

The seventh part (*“Forecast for the Russian market of bedside monitors to 2018”*) dedicated to an overlook of the future perspectives of the Russian market of bedside monitors. Based on the analysis of drivers and barriers for the market growth, two scenarios of market development are presented.

The eighth part (*“Business environment in Russia”*) provides a practical guide to what is necessary for achieving compliance with Russia’s regulatory requirements. It also describes Russian policies on health care system and medical device market development.

Sources of Information

- ✓ The public procurement of medical devices database:

MDpro’s database on public (government and municipal) procurement of medical devices and expendables for medical facilities. Updated every month using information from www.zakupki.gov.ru, processed for details and broken down by segment of the medical device market.

- ✓ The exports and imports database:

MDpro’s database of customs transactions for medical devices and expendables. Updated every month using official statistics from customs, processed for details and broken down by segment of the medical device market.

- ✓ Open sources:

- official health care statistics;
- publications of international marketing agencies;
- news;
- companies’ official reports.

Contents

STUDY METHODOLOGY

INTRODUCTION

1. RUSSIAN MEDICAL DEVICE MARKET IN 2013-2018
2. THE GLOBAL AND RUSSIAN MARKETS OF BEDSIDE MONITORS IN 2012-1ST HALF OF 2014
3. SALES OF BEDSIDE MONITORS OF SPECIFIC MANUFACTURERS
 - 3.1. Classification of bedside monitors
 - 3.2. Best-selling models and sales figures of leading manufacturers on the Russian market
4. IMPORTS AND EXPORTS OF BEDSIDE MONITORS ON THE RUSSIAN MARKET
 - 4.1. Imports of bedside monitors
 - 4.2. Exports of bedside monitors
5. PUBLIC PROCUREMENT OF BEDSIDE MONITORS
 - 5.1. Dynamics and structure of public procurement of bedside monitors
 - 5.2. Top public buyers of bedside monitors
 - 5.3. Leading suppliers of bedside monitors to public buyers
 - 5.4. Public procurement of bedside monitors in Russian regions
6. PRICING OF BEDSIDE MONITORS
7. FORECAST FOR THE RUSSIAN MARKET OF BEDSIDE MONITORS TO 2018
8. BUSINESS ENVIRONMENT IN RUSSIA
 - 8.1. The regulation of medical devices in Russia
 - 8.2. Russian policies on health care system and medical device market development

List of Figures

Figure 1 – Russian medical device market dynamics in 2009-2013

Figure 2 – The structure of public procurement by device category in 2013

Figure 3 – Forecast of Russian medical device market dynamics in 2014-2018 (RUB bln.)

Figure 4 – Forecast of Russian medical device market dynamics in 2014-2018 (USD bln.)

Figure 5 – Relative size of the global and Russian markets of bedside monitors in 2013 (value)

Figure 6 – Dynamics of the Russian market of bedside monitors (value), 2012-1st half of 2014

Figure 7 – Imported vs. domestic bedside monitors on the Russian market of bedside monitors, 2012-1st half of 2014. (value), %

Figure 8 – Procurement of bedside monitors on the Russian market in 2012-1st half of 2014

Figure 9 – Map of the global market of bedside monitors (value)

Figure 10 – Map of the Russian market of bedside monitors (value) in 2012

Figure 11 – Map of the Russian market of bedside monitors (value) in 2013

Figure 12 – Map of the Russian market of bedside monitors (value) in the 1st half of 2014

Figure 13 – Sales of bedside monitors of GE Healthcare, models, in 2012

Figure 14 – Sales of bedside monitors of GE Healthcare, models, in 2013

Figure 15 – Sales of bedside monitors of GE Healthcare, models, in the 1st half of 2014

Figure 16 – Sales of bedside monitors of Philips, models, in 2012

Figure 17 – Sales of bedside monitors of Philips, models, in 2013

Figure 18 – Sales of bedside monitors of Philips, models, in the 1st half of 2014

Figure 19 – Sales of bedside monitors of Nihon Kohden, models, in 2012

Figure 20 – Sales of bedside monitors of Nihon Kohden, models, in 2013

Figure 21 – Sales of bedside monitors of Nihon Kohden, models, in the 1st half of 2014

Figure 22 – Sales of bedside monitors of DraegerMedical, models, in 2012

Figure 23 – Sales of bedside monitors of DraegerMedical, models, in 2013

Figure 24 – Sales of bedside monitors of DraegerMedical, models, in the 1st half of 2014

Figure 25 – Sales of bedside monitors of Triton-ElectronicS, models, in 2012

Figure 26 – Sales of bedside monitors of Mindray by model in 2012

Figure 27 – Sales of bedside monitors of Mindray by model in 2013

Figure 28 – Sales of bedside monitors of Mindray, models, in the 1st half of 2014

Figure 29 – Sales of bedside monitors of Dixon, models, in 2012

Figure 30 – Sales of bedside monitors of Dixon, models, in 2013

Figure 31 – Sales of bedside monitors of Dixon, models, in the 1st half of 2014

Figure 32 – Sales of bedside monitors of NPP Monitor, model MITAR-01-R-D, in 2012-1st half of 2014, units

Figure 33 – Sales of bedside monitors of NPP Monitor, model MITAR-01-R-D, in 2012-1st half of 2014, RUB mln.

Figure 34 – Sales of bedside monitors of Comen, models, in 2012

Figure 35 – Sales of bedside monitors of Comen, models, in 2013

Figure 36 – Sales of bedside monitors of Comen, models, in the 1st half of 2014

Figure 37 – Sales of bedside monitors of Bionet, models, in 2012

Figure 38 – Sales of bedside monitors of Bionet, models, in 2013

Figure 39 – Sales of bedside monitors of Bionet, models, in the 1st half of 2014

Figure 40 – Quarterly imports in 2012-1st half of 2014. RUB mln.

Figure 41 – Annual imports in 2012-1st half of 2014, RUB mln.

Figure 42 – Imports by country of origin (value) in 2012

Figure 43 – Imports by country of origin (value) in 2013

Figure 44 – Imports by country of origin (value) in the 1st half of 2014

Figure 45 – Imports by manufacturer (value) in 2012

Figure 46 – Imports of bedside monitors by manufacturer (value) in 2013

Figure 47 – Imports by manufacturer (value) in the 1st half of 2014

Figure 48 – Exports in 2012-1st half of 2014, RUB mln.

Figure 49 – Sales under public contracts, 2012-1st half of 2014 (value).

Figure 50 – Public procurement of bedside monitors, 2012-1st half of 2014, RUB mln.

Figure 51 – Quarterly procurement in 2012-1st half of 2014, RUB mln.

Figure 52 – Procurement by device mobility (value) in 2012

Figure 53 – Procurement by device mobility (value) in 2013

Figure 54 – Procurement by device mobility (value) in the 1st half of 2014

Figure 55 – Procurement by patient age (value) in 2012

Figure 56 – Procurement by patient age (value) in 2013

Figure 57 – Procurement by patient age (value) in the 1st half of 2014

Figure 58 – Procurement by type (value) in 2012

Figure 59 – Procurement by type (value) in 2013

Figure 60 – Procurement by type (value) in the 1st half of 2014

Figure 61 – Procurement by grade (value) in 2012

Figure 62 – Procurement by grade (value) in 2013

Figure 63 – Procurement by grade (value) in the 1st half of 2014

Figure 64 – Regions leading in procurement (value) in 2012

Figure 65 – Regions leading in procurement (value) in 2013

Figure 66 – Regions leading in procurement (value) in the 1st half of 2014

Figure 67 – Regions leading in procurement (volume) in 2012

Figure 68 – Regions leading in procurement (volume) in 2013

Figure 69 – Regions leading in procurement (volume) in the 1st half of 2014

Figure 70 – Procurement distribution (value) by Federal District in 2012

Figure 71 – Procurement distribution (volume) by Federal District in 2012

Figure 72 – Procurement distribution (value) by Federal District in 2013

Figure 73 – Procurement distribution (volume) by Federal District in 2013

Figure 74 – Procurement distribution (value) by Federal District in the 1st half of 2014

Figure 75 – Procurement distribution (volume) by Federal District in the 1st half of 2014

Figure 76 – A forecast for the Russian market of bedside monitors, RUB mln.

List of Tables

- Table 1 – Classification of bedside monitors by tracked parameters
- Table 2 – Classification of bedside monitors by number of channels
- Table 3 – Monitors sold on the Russian market
- Table 4 – Top 20 recipients of imported bedside monitors at customs, 2012-1st half of 2014
- Table 5 – Top recipients of equipment by Philips
- Table 6 – Top recipients of equipment by GE
- Table 7 – Top recipients of equipment by Draeger
- Table 8 – Top recipients of equipment by Nihon Kohden
- Table 9 – Top recipients of equipment by Mindray
- Table 10 – Top recipients of equipment by Dixon
- Table 11 – Top recipients of equipment by Schiller
- Table 12 – Top recipients of equipment by Comen
- Table 13 – Top recipients of equipment by Mennen Medical
- Table 14 – Top recipients of equipment by Sino-Hero
- Table 15 – The largest Russian exporters of bedside monitors in 2012-1st half of 2014, RUB
- Table 16 – Top 10 public buyers of bedside monitors (value) in 2012
- Table 17 – Top 10 public buyers of bedside monitors (volume) in 2012
- Table 18 – Top 10 public buyers of bedside monitors (value) in 2013
- Table 19 – Top 10 public buyers of bedside monitors (volume) in 2013
- Table 20 – Top 10 public buyers of bedside monitors (value) in the 1st half of 2014
- Table 21 – Top 10 public buyers of bedside monitors (volume) in the 1st half of 2014
- Table 22 – Top 10 public buyers of the highest-priced bedside monitors in 2012
- Table 23 – Top 10 public buyers of the highest-priced bedside monitors in 2013
- Table 24 – Top 10 public buyers of the highest-priced bedside monitors in the 1st half of 2014
- Table 25 – Top 10 suppliers to public buyers (value) in 2012
- Table 26 – Top 10 suppliers to public buyers (volume) in 2012
- Table 27 – Top 10 suppliers to public buyers (value) in 2013
- Table 28 – Top 10 suppliers to public buyers (volume) in 2013

Table 29 – Top 10 suppliers to public buyers (value) in the 1st half of 2014

Table 30 – Top 10 suppliers to public buyers (volume) in the 1st half of 2014

Table 31 – Average prices of bedside monitors under public contracts in 2012

Table 32 – Average prices of bedside monitors under public contracts in 2012

Table 33 – Average prices of bedside monitors under public contracts in 2013

Table 34 – Average prices of bedside monitors under public contracts in 2013

Table 35 – Average prices of bedside monitors under public contracts in the 1st half of 2014

Table 36 – Average prices of bedside monitors under public contracts in the 1st half of 2014

Table 37 – Prices of top 15 models of bedside monitors in public contracts

Table 38 – Average prices of bedside monitors under public contracts by Federal District in 2012-1st half of 2014